

Understanding Groups & Smart Groups

Last Modified on 02/28/2023 11:02 am EST

Donor Management System

Groups & Smart Groups are great tools to categorize, segment, and analyze your Contacts in the DMS. Groups & Smart Groups will help you to organize your Contact list.

The intention of Groups is to perform the same Action on multiple Contacts at once. You will be able to perform many [Actions](#) to all of the Contacts in your Groups such as sending them emails, adding Tags, and filtering Reports.

Table of Contents:

- [Groups](#)
- [Smart Groups](#)

Groups

Groups are static lists of Contacts that are maintained manually. You will have to select single or multiple Contacts to manually add them to or remove them from any Group you create.

Groups are usually used as a simple way of organizing a segment of your Contacts that don't have set predictable criteria.

Example of a Group:

Angela Martin, Phyllis Vance, and Pam Beesly have nothing in common but they are part of a Party Planning Committee in their organization.

You can create a Group called "Party Planning Committee" that organizes these specific Contacts. When a new Contact, Erin Hannon, joins the Party Planning Committee, Erin can be manually added to the "Party Planning Committee" Group.

Smart Groups

Smart Groups are dynamic lists of Contacts that are automatically updated based on set criteria. You will set these criteria while performing an [Advanced Search](#) for your list of Contacts.

Example:

Angela Martin, Phyllis Vance, and Pam Beesly have each donated over \$1,000 in the last fiscal year and live in Scranton.

You can create a Smart Group that captures Contacts that meet 2 sets of criteria:

(1) “donated over \$1,000 in the last fiscal year” and

(2) “lives in Scranton”.

Once a Smart Group is created, Angela, Phyllis, and Pam (or any other current and future Contact that match these set criteria) will be automatically added to the Smart Group.

If Erin Hannon moves to Scranton, she will not be added to this Smart Group. If Erin moves to Scranton and had donated more than \$1000 in the last fiscal year, she would automatically be added to this Smart Group.

Once created, you can perform Actions on all of the Contacts in the same Smart Group at once.
